

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

APPEAL BRIEF – 37 C.F.R § 1.192

U.S. Patent Application 09/902,729 entitled:  
“COMMUNICATION TRIGGERED JUST IN TIME INFORMATION”

**Real Party in Interest:** International Business Machines Corporation

**Related Appeals and Interferences:**

None

**Status of Claims:**

Claims 1-27 are pending.

Claims 1-4, 7-14, 18-23, and 27 stand rejected under 35 U.S.C. §102(c) as being anticipated by U.S. 6,708,202 (Shuman).

Claims 5, 15, and 25 stand rejected under 35 U.S.C. §103(a) as being unpatentable over U.S. 6,708,202 (Shuman) as applied to claims 1, 10, and 23 above, and further in view of U.S. 2002/0116505 (Higgins).

Claims 6 and 16 stand rejected under 35 U.S.C. §103(a) as being unpatentable over U.S. 6,708,202 (Shuman) and U.S. 2002/0116505 (Higgins) as applied to claims 1, 5, 10, and 15 above, and further in view of U.S. 6,828,989 (Cortright).

Claim 17 stands rejected under 35 U.S.C. §103(a) as being unpatentable over U.S. 6,708,202 (Shuman) as applied to claim 14 above, and further in view of U.S. 6,990,513 (Belfiore).

Claim 24 is rejected under 35 U.S.C. §103(a) as being unpatentable over Shuman as applied to claim 23 above, and further in view of Bowman-Amuah (6,704,303).

Claim 26 stands rejected under 35 U.S.C. §103(a) as being unpatentable over U.S. 6,708,202 (Shuman) as applied to claim 23 above, and further in view of U.S. 6,347,307 (Sandhu).

Applicants hereby appeal all of the pending claims (i.e., claims 1-27).

**Status of Amendments:**

No amendments were submitted after the Final Office Action mailed November 8, 2006.

**Summary of Claimed Subject Matter:**

The present invention provides for a system and method to automatically retrieve and render information regarding a source of incoming communications. In accordance with this method, an incoming communication is received from a source intended for one or more recipients. In particular, the incoming communications comprises a plurality of types such as e-mail, telephone, fax, IM, collaborative message, or combination thereof. Next, the identity of the source is detected and data is retrieved and extracted from a database that pertains to the source. The one or more recipients are notified of the incoming communication and the extracted data is presented to one or more recipients. The extracted data, for example, can include to-do entries, future and past event entries, journal entries, and profile information. The information may also be summarized before presenting to the one or more recipients.

The independent claims are listed below with embedded cross references to portions of the specification and the figures. The references are to paragraph numbers from publication US 2003/0014395 A1.

1. A method for automatically retrieving and rendering information regarding a source of incoming communications, said method comprising a plurality of steps, one or more of said steps implemented locally or remotely, said method comprising:

- a. receiving an incoming communication from a source intended for one or more

recipients **[see paragraph 0070 which describes scenario with more than one recipient]**, said incoming communications comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof **[see paragraph 0043 which describes multiple agents for different communication types]** ;

b. detecting identity of said source **[see paragraph 0040]**;

c. retrieving from a database, data regarding said detected source, and extracting data **[see paragraph 0041]** comprising any of, or combination of, the following information: to-do entries, future and past event entries, journal entries, and profile information **[see paragraph 0047]**;

d. summarizing said extracted data **[see paragraphs 0042 and 0056]**;

e. notifying said one or more recipients of said incoming communication, and **[see paragraph 0070 for an example where the call is connected through to the user along with rendering the information]**

f. rendering said data in one or more electronic devices associated with said one or more recipients of said incoming communication **[see paragraph 0057]**.

10. An article of manufacture comprising a computer usable medium having computer readable program code embodied therein which automatically retrieves and renders information regarding a source of incoming communications, said article comprising **[see paragraph 0079]**:

computer readable program code receiving an incoming communication form a source intended for one or more recipients, said incoming communications comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative

message, or combination thereof **[see paragraph 0070 which describes scenario with more than one recipient]** **[see paragraph 0043 which describes multiple agents for different communication types];**

computer readable program code detecting identity of said source **[see paragraph 0040];**

computer readable program code retrieving and extracting data regarding said detected source, said data **[see paragraph 0041]** comprising any of, or combination of, the following information: to-do entries, future and past event entries, journal entries, and profile information **[see paragraph 0047];**

computer readable program code summarizing said extracted data **[see paragraphs 0042 and 0056];**

computer readable program code notifying said one or more recipients of said incoming communications, and **[see paragraph 0070 for an example where the call is connected through to the user along with rendering the information]**

computer readable program code rendering said data in one or more electronic devices associated with said one or more recipients of said incoming communication. **[see paragraph 0057]**

14. A system for automatic retrieval and rendering of information related to one or more sources, said system comprising:

one or more databases storing information related to one or more sources, said databases accessible over one or more networks **[see FIG. 2, 234 and paragraphs 47 and 54];**

one or more device agents detecting incoming communications from said sources, said

incoming communications comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof, said device agents further extracting identity of said sources [see FIG. 2, 209 and paragraphs 43, 44, 45 and 46];

a retrieval manager operatively linked to said agents initiating retrieval of data, regarding said identified sources, from said databases [see FIG. 2, 106 and paragraphs 42, 43, 44, 45 and 46], and

a presenter operatively linked to said retrieval manager rendering said retrieved data in one or more electronic devices [see FIG. 2, 250 and paragraph 57].

23. A method for facilitating business transactions, based on information retrieved over the World Wide Web, said method comprising [see paragraph 0069]:

receiving an incoming communication from a business, said incoming communication comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof [see paragraph 0070 which describes scenario with more than one recipient] [see paragraph 0043 which describes multiple agents for different communication types];

detecting identity of said business [see paragraph 0069 where vendor identity is detected];

accessing the World Wide Web and retrieving and extracting information related to said detected identity [see paragraph 0069];

summarizing said extracted information [see paragraph 0072 where an analyst receives

**a list of key officers of a company], and**

performing a business transaction based on said summarized information **[see paragraph 0072 where the decision to buy or sell is facilitated]**.

27. An article of manufacture comprising a computer usable medium having computer readable program code embodied therein which facilitates business transactions, based on information retrieved over one or more networks, said article comprising **[see paragraphs 0069 and 0079]**:

computer readable program code receiving an incoming communication from a business, said incoming communication comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof; **[see paragraph 0070 which describes scenario with more than one recipient]** **[see paragraph 0043 which describes multiple agents for different communication types]**

computer readable program code detecting identity of said business; **[see paragraph 0069 where vendor identity is detected]**

computer readable program code accessing the World Wide Web and retrieving and extracting information related to said detected identity **[see paragraph 0069]**;

computer readable program code summarizing said extracted information **[see paragraph 0072 where an analyst receives a list of key officers of a company]**, and

computer readable program code performing a business transaction based on said summarized information **[see paragraph 0072 where the decision to buy or sell is facilitated]**.

**Grounds of Rejection to be Reviewed on Appeal:**

Applicants hereby appeal all of the pending claims (i.e., claims 1-27). Specifically, the following grounds of rejection are requested to be reviewed based on this Appeal:

1. Claims 1-4, 7-14, 18-23, and 27 stand rejected under 35 USC §102(e) as anticipated by US 6,708,202 (Shuman).
2. Claims 5, 15, and 25 stand rejected under 35 USC §103(a) as unpatentable over Shuman in view of US 2002/0116505 (Higgins).
3. Claims 6 and 16 stand rejected under 35 USC §103(a) as unpatentable over Shuman and Higgins and further in view of US 6,828,989 (Cortright).
4. Claim 17 stand rejected under 35 USC §103(a) and unpatentable over Shuman in view of US 6,990,513 (Belfiore).
5. Claim 24 is rejected under 35 U.S.C. §103(a) as being unpatentable over Shuman as applied to claim 23 above, and further in view of Bowman-Amuah (6,704,303).
6. Claim 26 stands rejected under 35 USC §103(a) as unpatentable over Shuman in view of US 6,347,307 (Sandhu).



**ARGUMENT:**

**REJECTIONS UNDER 35 U.S.C. § 102(e)**

1. Claims 1-4, 7-14, 18-23, and 27 stand rejected under 35 USC §102(e) as anticipated by US 6,708,202 (Shuman).

To anticipate a claim, as meant under 35 USC §102(e), a reference must identically disclose every feature recited in the claim. Appellants urge that Shuman does not identically disclose every single feature recited in these claims and, therefore, does not provide the factual basis to support a rejection under 35 USC §102(e).

**a.) Claim 1 and Claim 10**

Both claim 1 and claim 10 recite receiving an incoming communication. Appellants urge that FIG. 3 of Shuman and the other portion relied on by the Examiner do not explicitly disclose this specific claim recitation. While, this figure illustrates different architectural items of Shuman's system, Appellants believe that no portion of FIG. 3 illustrates an active step of receiving, as recited in the claims. Additionally, the portion of FIG. 9 relied on by the Examiner specifically relates to receiving user input to select an item to view. Simply selecting an item for view, is not identically equivalent to receiving an incoming communication, as recited in claims 1 and 10.

Additionally, claims 1 and 10 recite a plurality of communications types other than simply e-mail. In contrast, the Shuman system appears limited to an e-mail application (that

admittedly has different message types). The use of multiple mediums, or communication types, however, is not disclosed or contemplated by Shuman who, therefore, does not anticipate claims 1 and 10.

Appellants understand that an e-mail message may inherently include a sender's address. However, the mere inclusion of this information is not identically equivalent to the claim recitation of detecting the identity of the source of a message. The system of Shuman does not appear to automatically identify the source of an incoming communication as recited in the claims.

The Examiner has pointed to columns 11 and 16 of Shuman as disclosing retrieving from a database data regarding the detected source and extracting various data. Appellants urge that a careful reading of these portions of Shuman reveal that Shuman is extracting information about a user's calendar, not information about the source of the communication. Thus, Appellants urge that Shuman simply does not identically disclose retrieving and extracting data about the source of an incoming communication as recited in claims 1 and 10.

In claim 1 (and similarly in claim 10), steps a-d have already been performed on an e-mail, telephone call, IM, etc. before the recipient is even notified of the communication. As explained more fully in the specification, this feature enables the information about the source to be available instantly upon being notified of a communication as opposed to initiating the process only after a message is selected by a user. Accordingly, Appellants urge that Shuman does not identically disclose notifying the one or more recipients of the incoming communication, as is meant in claims 1 and 10.

As described above, Appellants urge that Shuman does not identically disclose every

feature recited in claims 1 and 10 and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**b.) Claim 2**

In addition to the reasons provided above with respect to claim 1, Appellants urge that Shuman simply does not disclose or contemplate the “past event entries” recited in claim 2. Thus, Shuman does not identically disclose every feature recited in claim 2 and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**c.) Claim 3**

In addition to the reasons provided above with respect to claim 1, Appellants urge that Shuman simply does not disclose or contemplate the sending the incoming communication via sockets, JMQ, RPC or RMI as recited in claim 3. Some of these interfaces may be present within the system of Shuman but the specific recited functionality is not disclosed by Shuman. Thus, Shuman does not identically disclose every feature recited in claim 3 and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**d.) Claim 4**

In addition to the reasons provided above with respect to claim 1, Appellants urge that claim 4 explicitly recites the implementing of the extracting step over one or more networks. The general recognition of Shuman that portions of his system could possibly be implemented in a distributed computing environment is not the specific, identical teaching required by 35 USC

§102(e). Thus, Shuman does not identically disclose every feature recited in claim 4 and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**e.) Claims 7, 11, and 19**

In addition to the reasons provided above with respect to claim 1, Appellants urge that these claims recite a client profile database and Shuman does not disclose nor even contemplate such a database. Thus, Shuman does not identically disclose every feature recited in these claims and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**f.) Claims 8 and 12**

In addition to the reasons provided above with respect to claim 1, Appellants urge that these claims recite extracting additional data over the World Wide Web and Shuman does not disclose nor even contemplate such extraction across a network. Thus, Shuman does not identically disclose every feature recited in these claims and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**g.) Claim 14**

The system of claim 14 recites that the one or more databases store information about the one or more sources. In direct contrast, Shuman (See column 14, lines 17-19) explicitly cite storing data “only in the message” and additionally “an appointment calendar maintained by the user.” Thus, Shuman does not identically disclose the one or more databases recited in claim 14.

Additionally, claim 14 recites a retrieval manager that initiates retrieval of data. In

contrast, the system of Shuman requires the user to initiate retrieval of any data such that data is not automatically provided to a user without them taking explicit actions. Thus, Shuman does not identically disclose the retrieval manager recited in claim 14 which initiates data retrieval.

As described above, Appellants urge that Shuman does not identically disclose every feature recited in claim 14 therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**h.) Claims 18 and 20**

Appellants do not argue the patentability of these claims separately from their respective parent claims.

**i.) Claim 21**

In addition to the reasons provided with respect to claim 14, Appellants urge that claim 21 recites identifying calendar entry locators associated with one or more sources and that Shuman does not disclose nor even contemplate this recited feature. Thus, Shuman does not identically disclose every feature recited in this claim and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**j.) Claim 22**

In addition to the reasons provided with respect to claim 14, Appellants urge that claim 22 recites the inclusion of a wireless network and that Shuman does not disclose nor even

contemplate this recited feature. Thus, Shuman does not identically disclose every feature recited in this claim and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**k.) Claim 23 and 27**

Many similar claim features are recited in claims 23 and 27 that are recited in earlier discussed claims such as claim 1, for example. Thus, many of the arguments already presented are applicable as well to claims 23 and 27. In addition, two significant features of these claims are not disclosed by Shuman. First, Shuman does not disclose the extraction of external data about a business separate from any information contained in the message. Thus, no identification of the business is disclosed by Shuman. Secondly, Shuman does not disclose performing a specific business transaction which is based on such extracted (and summarized) information.

As described above, Appellants urge that Shuman does not identically disclose every feature recited in claims 23 and 27 and therefore does not provide the factual basis to support a rejection under 35 USC §102(e).

**REJECTIONS UNDER 35 U.S.C. § 103(a)**

To establish a prima facie case of obviousness under U.S.C. § 103, three basic criteria must be met. First, there must be some suggestion or motivation, either in the references themselves or in the knowledge generally available to one of ordinary skill in the art, to modify

the reference or to combine reference teachings. Second, there must be a reasonable expectation of success. Finally, the prior art reference (or references when combined) must teach or suggest all the claim limitations. Additionally, the teaching or suggestion to make the claimed combination and the reasonable expectation of success must both be found in the prior art, and not based on applicant's disclosure (In re Vaeck, 947 F.2d 488, 20 USPQ2d 1438 (Fed. Cir. 1991)).

In general, Appellants urge that the primary reference, Shuman, does not disclose or suggest the features recited in the independent claims. Thus, even when Shuman is combined with a secondary reference that purportedly shows a specific element of a dependent claim, the combination fails to teach or suggest every element of the dependent claims which inherit all the features from their parent claims.

2. Claims 5, 15, and 25 stand rejected under 35 USC §103(a) as unpatentable over Shuman in view of US 2002/0116505 (Higgins).

To support a prima facie case of obviousness under 35 USC §103(a), the combination of references must teach or suggest every feature recited in the claims. Appellants urge that the addition of Higgins and all its teachings does not remedy the shortcomings of Shuman as applied to Claims 1, 14 and 23. Thus, the combination of Shuman and Higgins does not teach or suggest every feature recited in claims 5, 15, and 25 and does not provide the support necessary to establish a prima facie case of obviousness under 35 USC §103(a).

3. Claims 6 and 16 stand rejected under 35 USC §103(a) as unpatentable over Shuman and Higgins and further in view of US 6,828,989 (Cortright).

To support a prima facie case of obviousness under 35 USC §103(a), the combination of references must teach or suggest every feature recited in the claims. Appellants urge that the addition of Cortright and all its teachings does not remedy the shortcomings of Shuman and Higgins as applied to Claims 5 and 15. Thus, the combination of Shuman, Higgins and Cortright does not teach or suggest every feature recited in claims 6 and 16 and does not provide the support necessary to establish a prima facie case of obviousness under 35 USC §103(a).

4. Claim 17 stands rejected under 35 USC §103(a) and unpatentable over Shuman in view of US 6,990,513 (Belfiore).

To support a prima facie case of obviousness under 35 USC §103(a), the combination of references must teach or suggest every feature recited in the claims. Appellants urge that the addition of Belfiore and all its teachings does not remedy the shortcomings of Shuman as applied to Claim 14. Thus, the combination of Shuman and Belfiore does not teach or suggest every feature recited in claim 17 and does not provide the support necessary to establish a prima facie case of obviousness under 35 USC §103(a).



5. Claim 24 stands rejected under 35 U.S.C. §103(a) as being unpatentable over Shuman as applied to claim 23 above, and further in view of Bowman-Amuah (6,704,303).

To support a prima facie case of obviousness under 35 USC §103(a), the combination of references must teach or suggest every feature recited in the claims. Appellants urge that the addition of Bowman-Amuah and all its teachings does not remedy the shortcomings of Shuman as applied to Claim 23. Thus, the combination of Shuman and Bowman-Amuah does not teach or suggest every feature recited in claim 24 and does not provide the support necessary to establish a prima facie case of obviousness under 35 USC §103(a).

6. Claim 26 stands rejected under 35 USC §103(a) as unpatentable over Shuman in view of US 6,347,307 (Sandhu).

To support a prima facie case of obviousness under 35 USC §103(a), the combination of references must teach or suggest every feature recited in the claims. Appellants urge that the addition of Sandhu and all its teachings does not remedy the shortcomings of Shuman as applied to Claim 23. Thus, the combination of Shuman and Sandhu does not teach or suggest every feature recited in claim 26 and does not provide the support necessary to establish a prima facie case of obviousness under 35 USC §103(a).

SUMMARY

As has been detailed above, none of the references, cited or applied, provide for the specific claimed details of applicant's presently claimed invention, nor render them obvious. It is believed that this case is in condition for allowance and reconsideration thereof and early issuance is respectfully requested.

As this Appeal Brief has been timely filed within the set period of response, no fee for extension of time is required. However, the Commissioner is hereby authorized to charge any deficiencies in the fees provided, including extension of time, to Deposit Account No. 09-0441.

Respectfully submitted by  
Applicant's Representative,

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**Claims Appendix:**

**1.** (Previously Presented) A method for automatically retrieving and rendering information regarding a source of incoming communications, said method comprising a plurality of steps, one or more of said steps implemented locally or remotely, said method comprising:

a. receiving an incoming communication from a source intended for one or more recipients, said incoming communications comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof;

b. detecting identity of said source;

c. retrieving from a database, data regarding said detected source, and extracting data comprising any of, or a combination of, the following information: to-do entries, future and past event entries, journal entries, and profile information;

d. summarizing said extracted data;

e. notifying said one or more recipients of said incoming communication, and

f. rendering said data in one or more electronic devices associated with said one or more recipients of said incoming communication.

**2.** (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 1, wherein said combination of retrieved data comprises the following information: to-do entries, future and past event entries.

3. (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 1, wherein said incoming communication is sent via any of the following: sockets, Java messaging queue (JMQ), remote procedure call (RPC), or remote method invocation (RMI).
4. (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 1, wherein said step of extracting data is performed over one or more networks.
5. (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 1, wherein said extracted data is in iCalendar format.
6. (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 5, wherein said method further comprises chronologically ordering said extracted data in iCalendar format.
7. (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 1, wherein said data is extracted from any of the following databases: an event database containing one or more recorded events, a to-do database containing one or more actions to be performed, a journal database containing one or more journal entries, or a profile database containing one or more profiles associated with one or more clients.

**8.** (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 1, wherein said step of extracting data further comprises extracting additional data related to said detected source from the World Wide Web (WWW).

**9.** (Previously Presented) A method for automatically retrieving and rendering information regarding a source of an incoming communication, as per claim 8, wherein said extracted additional data includes said profile data.

**10.** (Previously Presented) An article of manufacture comprising a computer usable medium having computer readable program code embodied therein which automatically retrieves and renders information regarding a source of incoming communications, said article comprising:

computer readable program code receiving an incoming communication from a source intended for one or more recipients, said incoming communications comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof;

computer readable program code detecting identity of said source;

computer readable program code retrieving and extracting data regarding said detected source, said data comprising any of, or a combination of, the following information: to-do entries, future and past event entries, journal entries, and profile information;

computer readable program code summarizing said extracted data;

computer readable program code notifying said one or more recipients of said incoming

communication, and

computer readable program code rendering said data in one or more electronic devices associated with said one or more recipients of said incoming communication.

**11. (Previously Presented)** An article of manufacture comprising a computer usable medium having computer readable program code embodied therein which automatically retrieves and renders information regarding a source of an incoming communication, as per claim 10, wherein said data is extracted from any of the following databases: an event database containing one or more recorded events, a to-do database containing one or more actions to be performed, a journal database containing one or more journal entries, or a profile database containing one or more profiles associated with one or more clients.

**12. (Previously Presented)** An article of manufacture comprising a computer usable medium having computer readable program code embodied therein, which automatically retrieves and renders information regarding a source of an incoming communication, as per claim 10, wherein said article further comprises computer readable program code extracting additional data related to said detected source from the World Wide Web (WWW).

**13. (Previously Presented)** An article of manufacture comprising a computer usable medium having computer readable program code embodied therein, which automatically retrieves and renders information regarding a source of an incoming communication, as per claim 12, wherein said extracted additional data includes said profile data.

**14. (Currently Amended)** A system for automatic retrieval and rendering of information related to one or more sources, said system comprising:

one or more databases storing information related to one or more sources, said databases accessible over one or more networks;

one or more device agents detecting incoming communications from said sources, said incoming communications comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof, said device agents further extracting identity of said sources;

a retrieval manager operatively linked to said agents initiating retrieval of data, regarding said identified sources, from said databases, and

a presenter operatively linked to said retrieval manager rendering said retrieved data in one or more electronic devices.

**15. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 14, wherein said retrieved data is in iCalendar format.

**16. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 15, wherein said system further comprises a summarizer chronologically organizing said retrieved data in iCalendar format.

**17. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 14, wherein at least one of said one or more databases is a relational database that is accessible via search query language (SQL).

**18. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 14, wherein said requests for communication are any of the following: a pager message, an e-mail message, or a telephone call.

**19. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 14, wherein said one or more databases is any of the following: an event database containing one or more recorded events, a to-do database containing one or more actions to be performed, a journal database containing one or more journal entries, or a profile database containing one or more profiles associated with one or more clients.

**20. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 14, wherein said electronic devices are any of the following: telephones, mobile telephones, WAP-enabled telephones, pagers, personal digital assistants (PDAs), electronic tablets, personal computers (PCs), mobile computers, laptops, or wireless computer-based devices.

**21. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 14, wherein said system further comprises:

one or more entries locators associated with said one or more databases identifying specific calendar entries associates with said one or more sources, and  
a gatherer collecting and passing said identified specific calendar entries to said retrieval



manager.

**22. (Previously Presented)** A system for automatic retrieval and rendering of information related to one or more sources, as per claim 14, wherein said networks comprise any of the following: local area network (LAN), wide area network (WAN), wireless network, or Internet.

**23. (Previously Presented)** A method for facilitating business transactions, based on information retrieved over the World Wide Web, said method comprising:

- receiving an incoming communication from a business, said incoming communication comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof;

- detecting identity of said business;

- accessing the World Wide Web and retrieving and extracting information related to said detected identity;

- summarizing said extracted information, and

- performing a business transaction based on said summarized information.

**24. (Previously Presented)** A method for facilitating business transactions, based on information retrieved over the World Wide Web, as per claim 23, wherein said communication is a telephonic communication.

**25. (Previously Presented)** A method for facilitating business transactions, based on information retrieved over the World Wide Web, as per claim 23, wherein said method further comprises the

step of rendering said summarized information in one or more browser enabled electronic devices associated with one or more clients.

**26. (Previously Presented)** A method for facilitating business transactions, based on information retrieved over the World Wide Web, as per claim 23, wherein said business transaction are transactions related to financial securities.

**27. (Previously Presented)** An article of manufacture comprising a computer usable medium having computer readable program code embodied therein which facilitates business transactions, based on information retrieved over one or more networks, said article comprising:

computer readable program receiving an incoming communication from a business, said incoming communication comprising a plurality of communication types selected from the group: e-mail, telephone, fax, IM, collaborative message, or combination thereof;

computer readable program code detecting identity of said business;

computer readable program code accessing the World Wide Web and retrieving and extracting information related to said detected identity;

computer readable program code summarizing said extracted information, and

computer readable program code performing a business transaction based on said summarized information.

## **Evidence Appendix**

None

**Related Proceedings Appendix**

None